

INSTRUCTIONS FOR HOW TO COMPLETE THE NEW FOREIGN TRAVEL PAPERWORK

Section I - Traveler Information

1. Last, first and middle name – Middle name must be spelled out – no initials.
If no middle name – indicate as NMN
2. Answer yes or no. If yes, enter social security number.
3. Passport Number and Expiration date (enter month as 3 letter abbreviation, day, and year. (Mon-DD-YYYY)
4. Enter birth date: enter month as 3 letter abbreviation, day, year (Mon-DD-YYYY)
5. Birth Place – Enter City, State/Province, Country)
6. Citizenship
7. DOE Facility/Organization: Thomas Jefferson National Laboratory
8. Employee Type: Jefferson Lab employees are contractors.
Name of contractor: SURA
9. Employment Address: 12000 Jefferson Avenue
Newport News, Virginia 23606
10. Contact Information: **(This area must be completed)**
11. Position/Title: Self-explanatory
12. Security Clearance: Check with your traveler and answer accordingly.
13. Notes: A free space for you to provide any additional information about the traveler, trip, etc. This space may be left blank.
- 13,a. Current nonimmigrant Visa type and expiration date: Enter appropriate Visa type (i.e., F, J, H, etc.) and the expiration date (MMM-DD-YYYY). You will also need to indicate whether you will require a new Visa to return to the U.S. If not on a nonimmigrant Visa, enter N/A in the Visa type space.

Section II – General Trip Information

14. Place of Departure: Will usually be Newport News, Norfolk or Richmond. There are instances when the traveler is going to another location in the U.S. prior to beginning his foreign travel. In this case, enter the location where he is departing from the United States. The domestic portion of the trip will not be entered on the foreign paperwork, and in fact, normally is a separate trip.
15. Departure Date: This date will be the same date as the start date of the first itinerary.
16. Return Date: This date will be the same date as the end date of the last itinerary.
17. Indicate the funding type as DOE, Non-DOE, or Foreign and enter the Project and Org **or** the non-doe or foreign source (example: Norfolk State or DESY). Enter the estimated airfare in the appropriate block and the remaining cost in the estimated other block. If DOE and another source are funding the trip, break the costs out accordingly.

Example:

<u>Funding</u>	<u>Project</u>	<u>Org</u>	<u>Non-Doe/Foreign</u>	<u>Estimated Airfare</u>	<u>Estimated Other</u>
(x) DOE	HallA	HallA		500.00	0
(x) Foreign			DESY		800.00

18. Flight Information: All JLAB travel is Coach. If not, justification must be provided.
19. **This section will normally be left blank.**
20. Enter all known travelers from lab or other organizations with whom you are traveling as a team.
21. Benefit to Government (**This section must be completed**)
22. Comments: Can be used for justification statement for trips that are exceptions, specify any paper attachments, general comments regarding trip request and/or place of return if not same as departure city and reason. **Late justification is needed for trips arriving in the travel office less than 30 days for non-sensitive travel and 45 days for sensitive or major conference travel.**

Section III – Trip Itinerary

23. Answer yes or no and indicate conference name if answer is yes. The conference sponsor name and conference URL can be left blank.
24. Destination (Country & City): Enter the city of the business location. This is not necessarily the same as the location of the airport that the traveler is flying into.
25. Start Date: (Mon-DD-YYYY) use 3 letter abbreviation for month. The start date of the first itinerary should be the same as the departure date in the previous section.
26. End Date: (Mon-DD-YYYY) use 3 letter abbreviation for month. The end date will be the same as the departure date used in the previous section unless there is an additional itinerary. In the case of an additional itinerary, the end date will be the last night spent at the location.

For multiple itineraries, the end date of one itinerary will not be the same as the start date of the next itinerary. Hint: Think of how you will expense out the per diem. The per diem is based on where the traveler was at midnight (or where did he spend the night?).

27. Notice that the primary purposes have changed from the old form. You may select one or more purposes for each location. When “Other” is selected, a definition must be provided. Example: Personal Time. However, do not combine (Other) personal time and business time in one itinerary. **Personal time will always be a separate itinerary regardless of the location.**
28. Technical Justification: **This section must be completed.** An example of an acceptable entry is the title of the paper being presented. Entries such as “give a talk” or “discuss a collaboration” are too vague. Be as specific as possible in the allotted amount of space.
- 29-37. In most instances, no will be the answer to all of these questions; however, please read through them in the event that there is an exception.
38. Contact Information: **This information is required. Leaving it blank will delay approval of the trip.** The after hours contact may be either a person or hotel.

Reviews and Approvals

Please note that the paperwork now requires the preparer (normally a travel coordinator) to sign. Other signatures include the traveler, the international liaison manager (if a new Visa is required to re-enter the U.S., see 13a), the traveler's supervisor, the associate director, a reviewer from the travel department, the lab director and, if necessary, the DOE site manager. The travel department will obtain the lab director and DOE site manager signatures after reviewing the completed form.

Proforma Invoice

The traveler must complete this form if (s)he is taking a JLab laptop/notebook computer, any equipment or instruments from the Lab. Be sure they have signed the certification at the bottom of the invoice before submitting it to travel. The travel department will deliver the form to Material Control who will prepare the necessary paperwork to accompany the JLab property through Customs.

IMPORTANT REMINDERS

Although trips are required to be submitted in the system at 21 days for non-sensitive and 30 days for sensitive and major conference travel, the extra days noted below are incorporated as a guideline to allow for reviews at the travel department, the director's office and the DOE site office. Every effort is made in the travel department to route the request to the next level within 24 hours. However, due to the Lab Director's schedule as well as the DOE site manager's schedule, a quick turnaround cannot always be expected. Please suggest to your travelers to request approval of their foreign travel as soon as they are aware of it. Submitting the foreign travel paperwork is only a step towards taking the trip. It is easier to void the trip than try to hastily get it approved.

Non-sensitive travel should be submitted to the travel department no later than 30 days before the start of the trip.

Sensitive travel and travel to major conferences, should be submitted to the travel department no later than 45 days before the start of the trip.